



Mentoring Program

Successful Business Building Steps

Designated Phone Checklist

Use this checklist to decide whether your current cell phone or home phone is the right choice for use as your designated business phone.

For each option below, put a **Check Mark (✓)** for **YES** or an **X** for **NO**

1. Privacy: I'm comfortable with having this phone number:

- On my Business Cards
- On my Website
- On Flyers and Announcements
- In Phone Books, Online Directories, etc.
- Used by other Experts, Authors and Teachers

Cell Phone	Home Phone	I need a new solution

2. Who will answer this phone?

- My spouse/partner may answer this phone
- My spouse/partner can answer this phone professionally
- My children may answer this phone
- My children can answer this phone professionally

Cell Phone	Home Phone	I need a new solution

3. Incoming Voicemail Messages

- Will you be able to easily screen your phone calls?
- Will you be able to easily access your voicemail messages?

Cell Phone	Home Phone	I need a new solution

4. After-Hours Calls

Can you turn this phone off after hours?
 Can you block phone numbers and texts with this phone?
 Will your answering system record if the phone is off?

Cell Phone	Home Phone	I need a new solution

5. Caller ID

Will your name/number show up in a recognizable fashion on someone else's phone?
 Are you comfortable with how your name/number will show up on someone else's phone?

Cell Phone	Home Phone	I need a new solution

6. Outgoing Voicemail Greeting

Do I have a cutsey message that I need to change?
 Can my greeting speak specifically to my ideal clients' interests?

Cell Phone	Home Phone	I need a new solution

7. 800 Number? Zoom Phone?

Do I need a toll-free number for my clients to use?
(There's no need for a special number unless you NEED an 800/toll-free solution)

Yes or No

8. Final thoughts

Do I need a new solution for my dedicated business phone?

Cell Phone	Home Phone

Other Notes *(use the space below to make other notes about your phone solution) :*